Project Managers' Advisory Group

MINUTES
November 17, 2008

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Attending: **(* = by phone)**

Bob Giannuzzi	EPMO
Jesus Lopez	EPMO
Charles Richards	EPMO
Barbara Swartz	EPMO
Kathy Bromead	EPMO
Valerie Maat	EPMO
Glenn Poplawski	ITS
Kathleen Crawford	ITS
Chuck Clark	ITS
Lynne Beck	DHHS DMH/DD/SAS
Sara Liles*	DHHS DMH/DD/SAS
Lisa Haire*	DHHS DMH/DD/SAS
Alana Heuermann*	DHHS
Tory Russo*	DHHS DIRM
Gary Lapio*	DHHS DIRM
Herman Honeycutt	NCDA & CS
Sarah Joyner	ESC
Dave Butts*	WRC
Jim Skinner*	DOI
Emily McGill*	DOL
Vicky Kumar*	OSC
Lucy Cornelius	DPI
Cheryl Ritter*	DOT
Lloyd Slominsky	DOC

Bob Giannuzzi welcomed everyone to the meeting. **Chuck Clark** was introduced as a first time attendee.

Glenn Poplawski gave an overview of his area's role in the recently reorganized ITS Operations. He has both PMO and Service Transition responsibilities, the latter fitting the ITIL model. Besides providing PMs for ITS and other agency projects, his PMO has been focusing on the following activities: project charter, project prioritization algorithm, tools (including resource management). **Alana Heuermann** inquired about sharing information with other agencies. **Kathy Bromead** would like to see the agencies engaged with ITS in this activity. **Lucy Cornelius** asked about engagement of ITS services. Glenn advised reference to the ITS Service Catalogue and making requests through the Help Desk. The team was advised that further questions may be asked via email to Glenn..

Bob solicited and received approval of the October minutes.

Jesus Lopez gave an update on PMP Exam Prep Class. Cycle 8 was in its final week of classes, and a review session is slated for December 2. With the classes and ancillary activities (flashcards, sample quizzes, etc.) having served as preparation, students were urged to schedule the exam soon. Jesus advised that the 4th Edition of the PMBoK Guide will soon

be available and will be effective January 1. Having been informed that tests scheduled through 6/30/09 will be based on the 3rd edition, the EPMO is considering moving the spring class up a month from April/May to March/April to give our students two months to take the exam based on the current edition.

Bob advised the group of the following upcoming NCPMI meetings of interest.

NCPMI Venue	Speaker	Date/Topic
General Membership	Shaun Bradshaw	November 20 (5:30 PM) S-Curve and The Zero Bug Bounce
Public Sector LIG		February 5 (5:30 PM) TBD
PMO Committee	Lisa Mannion	December 3 (5:30 PM) Lessons Learned from Implementing IT Portfolio Management
Leadership Committee		TBD
Information Systems Committee		TBD

Barbara Swartz summarized Methodology Group activities:

- The checklist for monthly status reporting will be included in the next tool/process release slated for 1/6/09. That release will also include some revised/new templates.
- **Alisa Cutler** is working on the revision of the Procurement Plan document. ITS Procurement, Engineering & Architecture, and Legal are participating in this effort.

Bob passed out the following information on upcoming teleconferences of interest to the PM Advisory Group. He also pointed out that the EPMO would be meeting with the Executive Council account rep on 11/19 to get an update on the PMOEC service offerings. This will be reviewed at the December PMAG meeting.

Organization/website	Contacts	Upcoming Calls
NASCIO http://www.nascio.org/committees/projectmanagement/	Stephanie Jamison 859/514-9148 sjamison@AMRms.com Access 888/272-7337 conference ID 6916986	January 8 (3:00 PM) IT Succession Management: California's Planning Toolkit
PMO Executive Council http://www.pmo.executiveboard.com/	Register at website	November 19 (10:00 AM) **Responding to the Current Crisis: Improving the Infrastructure Cost Model** November 19 (11:00 AM) **Federated Resource Governance: Organizing for Resource Productivity**

		November 20 (12:00 PM) **Responding to the Current Crisis: Boosting Portfolio Productivity** December 10 (11:00 AM) **The Rise of Program Management: A Practitioner Panel**
CIO Executive Council http://www.cio.executiveboard.com/	Register at website	December 4 (10:00 AM) **Focusing IT on End User Productivity**
Application Executive Council http://www.aec.executiveboard.com/	Contact Bob Giannuzzi to register	November 18 (12:00 PM) **Quality Assurance and Testing: A Practitioner Panel** November 20 (11:00 AM) **Becoming an Employer of Choice: Recruiting, Developing, and Managing Applications Staff** December 4 (6:00 PM) **Planning for 2009: Emerging Applications Priorities**
Infrastructure Executive Council http://www.iec.executiveboard.com/	Contact Bob Giannuzzi to register	November 20 (11:00 AM) **Unix Server Virtualization: Early Adopter Panel Discussion** December 10 (10:00) **A Vision for Infrastructure: Future Technology and Management Trends**
Information Risk Executive Council http://www.irec.executiveboard.com/	Register at website	December 11 (1:00 PM) **Protecting the Enterprise against Hidden Supplier Solvency Risks**
Enterprise Architecture Executive Council http://www.eaec.executiveboard.com/	Register at website	November 20 (1:00 PM) **Leading in Uncertain Times: An EA Perspective on the Economic Crisis** December 4 (11:00) **Planning Long-Term Investment Strategies**

Bob solicited feedback from those who attended the recent PMI Global Congress. **Kathy Bromead** has white papers particularly on Agile Development as well as info on the value of project management, and PMO roles. She also had an opportunity to network with state government PMs from four other states and concluded that NC is way ahead in maturity. **Kathleen Crawford** discussed highlights from a presentation on PMO structure. **Vicky Kumar** came back with updates on new standards for program and portfolio managers. She

also pointed out that next years congress will be in Orlando and presenters will not be charged a registration fee, so check the call for papers. Anyone who'd like further information from this conference should email these attendees.

Bob advised that **Jim Tulenko** has moved on to OSC as Project Director for BEACON. Since the current PPM application cannot be upgraded, **Barbara Swartz**, **Charles Richards**, and **Linda Lowe** will investigate portfolio management tool alternatives and will seek agency participation in this effort.

The EPMO is looking to improve the set of PM templates currently available on its website. The group was asked to provide best practices at this month's meeting. **Sarah Joyner** brought several ESC PM templates and process documents to share. **Barbara Swartz** will review them for consideration to post on the EPMO website. **Bob** will share a set of MS Project RFP activities he got from DHHS. This will be an ongoing request at subsequent PMAG meetings.

Lessons Learned from a recently closed project are included below. The EPMO is looking to have an updated database on its website, hopefully with user friendly search capability.

Meeting adjourned at 4:55.

NEXT MEETING
Monday, December 15, 2008
ITS Conference Room 2 or (919)981-5520

Lessons Learned Documentation

Exhibit A

DOT – DMV IRP Audit Stop

Meeting the Clients from different sections of the DMV helped us to interpret senate bill into business requirements.

JAD sessions with clients helped us designing the system based on business requirements.

Allocate enough resources for system testing.

The clients should play a more active role in developing the test plan.

Exhibit B

DOT - DMV LITES Penalty Revisions

Multiple JAD sessions were held with client representatives of each area impacted by the project helped in designing the project requirements to math the client needs. The sessions also served to keep communication between the various groups involved open and constructive so that any potential issues were identified and resolved well before coding ever started on the project.

Performing a comprehensive integration test as part of unit testing helped to ensure that defects were kept to a minimum once the project left the build stage.

In certain situations, some of the data was quite old and had to be thrown out or manipulated. A batch sequence from the nightly schedule should be run in all regions prior to the start of actual testing in order to ensure that the data is as clean as possible.

Throughout the project, the client was kept apprised of every aspect of the project as it progressed from initiation to implementation. This ensured the customer was comfortable with the progress of the project and that issues were resolved in a timely and efficient manner.

As the customer possesses more detailed knowledge of the functionality of the applications involved, they should play a more active role in the development of the test plans.

With a project of this size that impacted so many different applications, system testing should be started as early as possible in order to catch any defects well before the project needs to be prepared for the move to the client region. This will ensure that the application is stable before the customer ever needs to be involved with the client testing.

During the implementation of the project, the data conversion ran significantly longer than had been anticipated. To accurately predict time requirements for conversions in future projects, it is important to execute and fine tune the conversion processes thoroughly in test prior to execution in production.

Exhibit C

DOT - DMV IRP/MC and LITES Upgrades and Migration

1. **LESSONS LEARNED** - What were the **positive** lessons learned (project strengths) from this effort?

   From Project Sponsor / User Organization:

   * Interaction between the LITES and IRP Teams was positive.

   * Questions or issues that arose during testing were resolved in a professional and timely manner.

   From Developer Organization:

   * Weekly progress meetings kept us informed of the project's current status

   * RFCs must be submitted well in advance

   * Allowed sufficient time for helping the contracting firm to learn the existing system

2. **LESSONS LEARNED** - What **opportunities for improvements** (project weaknesses) were learned with this project?

   From Project Sponsor / User Organization:

   * Test data provided for users could not be used, testing delayed pending receipt or replacement data.

   * Volume testing was difficult due to reoccurring system problems.

   * System testing was conducted at the same time as client testing for this project due to time limitations. Based on our experience with this project, we woul recommend that system testing be done prior to client testing whenever possible to ensure the most effective and efficient testing.

Exhibit D

DOT - DMV Automated Testing System

1. **LESSONS LEARNED** - What were the **positive** lessons learned (project strengths) from this effort?

We should build lag time for such a major project.
Communication with the sponsors (DMV) and I.T. is essential.
Team work and follow up are very important also.
Having skilled personnel at all levels.

2. **LESSONS LEARNED** - What **opportunities for improvements** (project weaknesses) were learned with this project?

Procurement personnel should be involved in the writing/discussion of the RFP process. A real understanding of business rules is important early on in the process.

Exhibit E

DOR - Raleigh Service Center VoIP

There is a continual need for oversight and communications with ITS during initiatives of this kind.

Exhibit F

DHHS NCMMIS+ Program – DHSR Business Process Automation

Level 1 Budget planning originally reflected an underestimation of Project resources and associated costs. I must assure budget planning is at an appropriate level, commensurate with Project scope (NEGATIVE)

Sponsor expectations of the Project, staff and reporting processes were clearly defined (POSITIVE)
Expectations were effectively supported and communicated through meetings and the EPMO's Project Portfolio Management (PPM) Tool (POSITIVE)

The development of an agreed-upon Program direction and strategy consumed more time and resources than originally planned. Program governance was not approved until early in 2007, resulting in a delayed Project approval process. Agencies should delineate a project's governance prior to its initiation whenever possible. (NEGATIVE)

Sponsor expectations were clearly defined and conveyed during this phase of the Project. (POSITIVE)

Customer expectations were well supported and communicated during this and subsequent phases of the Project. (POSITIVE)

A Program-Level Risk Management Plan was developed and adapted by the BPA Project. (POSITIVE)

Issues were identified and escalated, when applicable. The PPM Tool aided in tracking and resolving overall Project issues (POSITIVE).

Monthly status reporting facilitated oversight and control of the Project's milestones, issues and risks. (POSITIVE)

The PPM Tool allowed for the monitoring of resource utilization. I must assure staff planning is at an appropriate level, i.e., commensurate with Project scope (POSITIVE)

Project scheduling, milestones, and pProject planning activities were effectively accomplished using MS Project (POSITIVE)

The Project approval process occurred without significant issues or delays. The PPM tool greatly assisted in standardizing the process and appropriately defines expectations for Project approval steps. (POSITIVE)

Sponsor expectations were managed through scheduled communication meetings, timely delivery of Project deliverables and through Status reporting utilizing the PPM Tool (POSITIVE)

Customer expectations were achieved via an iterative process of distributing Project deliverables, customer feedback and through Status reporting utilizing the PPM Tool (POSITIVE)

Issue management was handled as an interactive process between the ITS project monitoring process and the OMMISS PM, and the OMMISS and DIRM QA teams. Responses were made to all registered issues before the next monthly reporting period. Corrective Action Plans were developed. (POSITIVE)

The BPA Project's Tracking Tool (Tracker) facilitated the resolution of identified business process development issues, but efficiencies in this process were hindered by the lack of required resources. I must assure resource planning is at an appropriate level, commensurate with Project scope (NEGATIVE).

The PPM Tool allowed for the monitoring of resource utilization and for responding to adjustments in personnel and tools. (POSITIVE)

The Program-Level Communications Plan adapted by the BPA Project proved to be effective and promoted consistency regarding "Project to Customer" communications (POSITIVE).

The DHSR BPA Project processed two Change Requests during the life of the Project. The Change Control process is well defined. I need to provide more time in the Project schedule for the respective DIRM and OMMISS QA reviews to occur (POSITIVE)

Exhibit G

WRC - Interactive Voice Response (IVR) Implementation

The ability to bring in appropriate vendors to deliver services to meet our specific needs and timelines in order to meet the business requirements greatly impacted the success of the project.

Exhibit H

ITS - Distribution Network

Sometimes the smallest project (cost wise) can yield large benefits.

Always make sure to add adequate time for gate approval process so that the project does not get disrupted.

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Make sure that you have customer buyin to the schedule to avoid delays and project extensions due to the customer not being available or ready to proceed.

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Exhibit I

DOJ - Learning Management System

Initiation Phase:

Topic	Lessons Learned
1. Business Case / Project Charter	The Project Charter template created by Andrew Schoenburg assisted greatly in the PPM Tool data entry. Two items were added to this Project Charter template per experience from this project: OSBM questions and P&D estimates.
2. Level 1 Budget	The way PPM Tool spreads the Level 1 Budget every month across the phases equally became a problem when these figures were being updated in P&D phase. EPMO QA considered these figures as baseline for QA measurement, whereas the real project baseline would not occur until the end of P&D. This is still confusing, where NCDOJ now provides Level 3-4 estimate at Initiation Phase to avoid any major conflicts upfront with EPMO QA.
3. Benefits	Calculations were still accurate throughout the project lifecycle.
4. Procurement Plan (procurement strategy….build vs buy)	Per PMI PMBOK, Procurement Plan is part of the project management plans developed during P&D. Why is this required at Initiation?
5. Project Approval Process	OSBM, OSC, and ITS ETS plus Security questions were not part of the Project Charter. Despite the fact that the PPM Workflow had these as Initiation deliverables, the details required should have been asked as part of P&D, not Initiation. Case in point: Detailed questions from ITS senior management had to be formally addressed in the PPM Tool, but these were mostly P&D-related questions not Initiation.
6. Managing Sponsor Expectations	Traditionally, the project sponsor is also the business project owner (aka customer), in which both scope and budget are approved by the same people. It appears in NC state government, the project sponsor is actually separate: one for budget and one for scope. In this project, NCJA was the business project owner (for scope) and the funding was under the management of the agency's CFO with the CIO providing the "IT Project Sponsor" role. This condition complicated the communication and project management efforts for the PM, since multiple parties had to be coordinated together to obtain any approvals or reviews.
7. Managing Customer Expectations	See #6.
8. Other	There was a three-week timeframe in ITS project approval process between agency and ITS PPM approvals, but no reason was given by ITS EPMO. The agency approval was completed on 09/12/2006, but the final Gate 1 approval was given on 10/09/2006. Luckily, this did not significantly delay the project since the agency started the RFP development internally and no contractors were being hired for this effort.

Planning & Design Phase:

Topic	Lessons Learned
1. Updated Business Case	There was no significant change in the business case.
2. Updated Budget	There were change requests to address increased time due to ITS IT Procurement additional procurement processes. Funding source was secured at Initiation phase, so this was never an issue.
3. Updated Benefits	There was no significant change in the benefits.
4. Updated Procurement Plan	The Procurement Plan had no effect on ITS IT Procurement since they do not sign-off on the document. The template is from ITS EPMO, not ITS IT Procurement. Basically,

Topic	Lessons Learned
	the Procurement Plan only addressed agency-level processes and interfaces to ITS IT Procurement and EPMO. However, since majority of the actual project-procurement effort is with ITS IT Procurement, the Procurement Plan was basically ineffectual. Plus, the agency's project manager (PM) was told by ITS IT Procurement that they do not participate in any procurement development activities with the agency (such as bid/BAFO simulations) due to potential conflict of interest with their primary mission. Hence, there were no effective mitigation strategies except to absorb the schedule timeline extensions as much as possible. The agency PM recommends re-examining how ITS IT Procurement and ITS EPMO can be better engaged in RFP development with the agency to avoid any confusions and delays.
5. Project Approval Process	Once the RFP and contract portion of the phase were completed, the project approval was very easy to achieve.
6. Managing Sponsor Expectations	NCJA was absolutely astonished that a small project like this took longer in procurement with more government paperwork than with multi-million dollar construction projects that they typically manage for the campus. The value of the process, beyond meeting SB991 (2004) requirements, was also questioned by the agency project sponsor See #15 for possible mitigation strategies.
7. Managing Customer Expectations	See #6.
8. Risk Management	As noted in #4, the biggest "risk" was ITS and there were really limited options in addressing or mitigating this risk, which predominantly impacted schedule despite anticipating additional time required to work with ITS. Frequent and consistent communication with PMA and ITS IT Procurement eased the burden of this risk, and this was the best strategy available.
9. Issue Management	The ITS EPMO QA issue management became a major time-consuming effort for the PM since every clerical or process error became an issue. The agency's PM was also very inexperienced in ITS EPMO project management process and expectations since this was his first NC state government project. PM had studied the ITS EPMO PPM reference materials to try and mitigate any issues or risks beforehand. Some of these issues were deemed critical, to the point that the PM with the agency's CIO was called by the ITS EPMO twice for escalation meetings to resolve these issues. There should be a separate methodology to deal with clerical or process errors, since these are not true project issues, and they together should not be listed in the PPM Tool as "Issues".
10. Monthly Status Reporting	The PM was informed by PMA that he did not have to do any monthly status report in September 2006 due to project approval delays. However, the ITS EPMO QA expected the monthly status report, so when the report was not generated, the project was immediately in a "red flag" situation at the beginning of the phase. It is the opinion of this PM that the reporting for this phase never recovered and continued to encounter issues as noted above.
11. Staffing Plan	This was very simple since the project became a firm-fixed priced contract for the remaining phases, and the vendor managed their own resources. Only IT-related effort was recorded in this project in these remaining phases. Any business-related effort, such as course development, was not part of the staffing plan.
12. Project Schedule / Milestones / Project Planning	As noted in #4, the original P&D phase end date was extended by four additional months per two separate change requests. Total time for P&D was 11 months, in which ¾ of the time was spent in procurement activities.
13. ETS System Design Document	The vendor was surprised by the amount of details required by ITS ETS on an externally-hosted solution. Learn.com had provided solutions to multiple federal and state agencies (plus private firms), and they had never encountered the level of architecture details required for contract approval.
14. Requirements Mapping	Product scope versus project scope: these were the same for this project per the RFP and vendor solution. One single business deliverable was the product scope.
15. Other	• RFP Development Conflicts: o Battle of the Legals: The agency's lawyer and ITS IT Procurement had numerous disagreements, to the point that the phase had to be extended to resolve these disagreements. For example, a solicitation document would pass the agency's legal and internal procurement review, which then it would be rejected by ITS IT Procurement. This caused a lot of rework. o Terms & Conditions (T&Cs) Disparity: Even though the T&Cs were

Topic	Lessons Learned
	used from the templates provided by ITS IT Procurement on their web site, it took time for the T&Cs to be "correct" for the RFP. o RFP Training was Ineffective: Although the PM attended the two day training class on February 6-7, 2007 and approved by ITS IT Procurement, it was of limited value since most of the information learned in this class could not be applied with this project's RFP development efforts. For example, the class stressed having a single BAFO and negotiating earlier as part of clarifications. However, this was not permitted according to ITS IT Procurement since negotiations occur during BAFOs. It is possible that the new training class offered by ITS IT Procurement (http://www.its.state.nc.us/ITProcurement/Training.asp) could be a vast improvement and be more applicable to project-procurements. o Private versus Government Procurement: The agency's PM experience was predominantly in private industry with the PMI PMBOK guidelines, so the ITS IT Procurement's rules and processes were very new. The PM studied the reference materials on the ITS IT Procurement web site beforehand, but unique differences and procurement challenges at the project level caused project delays. A more efficient and effective process with training should be established to permit PMs from private industry to transition into state government project-procurement methodologies, avoiding a lot of the differences and challenges encountered in this project. • RFP and Bid Format/Content Requirement: When the vendor bids were received, all of them missed the mandatory format/content requirement as stated in the RFP. This should have signified that the RFP format requirement needed to be revised to be easier for the vendor to follow. The choice at this stage was to either reject all bids, or accept all bids under the "unresponsiveness" clause and subsequent clarifications managed on an individual basis. The latter was chosen to avoid wasting the effort already accomplished, and this in turn complicated the procurement process (which was one of the reasons for extending the P&D phase). Since all of the vendors involved had never worked with NC state government, there was a learning curve for them to understand the ITS IT Procurement rules and processes. It is recommended to re-examine the process where a "primer" or FAQ document could be provided to "first-time" vendors and agency PMs to avoid any gaps as encountered in this project. • Document Management: A central repository of the documents would have aided in the RFP development. This would have avoided the e-mail reply-alls and confusing document changes from multiple sources. NCDOJ ITD now has Microsoft SharePoint Services to provide this feature, and it is currently being used for the Case Management and T&S Conversion Projects. • Ultimately, all of the players involved made this phase a success and a contract was finally produced in August 2007.

Execution & Build Phase:

Topic	Lessons Learned
1. Project Schedule / Milestones / Project Planning	Project slipped of six (6) months due to project issue-resolution delays from vendor. Being a vendor-managed solution, there were limited penalties to instill, which would have caused further delays. Vendor understood that the Performance Measurement penalties per the RFP could have been executed. Luckily, the project issue was resolved and the vendor provided a six (6) months extension of the LearnCenter contract at no charge as remedy to the project schedule delays.
2. Resource Management (internal & external resources)	Since ITD was not involved (beyond the PM) and the contract was fixed price, this became a simple effort for NCDOJ.
3. Vendor Management / Vendor Performance / Vendor Deliverables	Two issues encountered: • On 11/6/2007, Learn.com let go their project and account managers due to internal downsizing efforts in their Government Section. Project-procurement hold was executed by NCDOJ until the project schedule and deliverables were

Topic	Lessons Learned
	verified. Replacement project and account managers were established by Learn.com and the vendor deliverables reviewed in detail. As of 11/20/2007, the hold was released and the project schedule was back on-track. • Next-Button Project Issue Resolution – this caused the 6 month delay in completing the project. Since the Acceptance Criteria was established as part of the RFP/contract, this issue had to be resolved by the vendor before closing the contract and project. It was finally resolved on August 6, 2008. If the Acceptance Criteria was not clear in the RFP/contract, NCDOJ would have to absorb both the costs of remedy and the subsequent operational risk of this issue.
4. Other	Vendor-provided value adds: Learn2Library courses were offered on Year 1 as a trial, and this has been renewed for Years 2 and 3 at minimal cost. This includes Microsoft Office 2007 on-line training (Word, Excel, etc.). Since NCDOJ is planning on rolling out Microsoft Office 2007 throughout the agency in the next six months, this training would be offered to all NCDOJ employees. It will also be offered to all law enforcement personnel enrolled in NCJA Learning Management System at no extra charge to the different law enforcement agencies.

Implementation Phase:

Topic	Lessons Learned
1. Other	Being a firm-fixed priced contract, both E&B and Implementation were a single effort, with Go Live as the end of Implementation. Lessons Learned in E&B was the same for Implementation except where noted.

General Comments:

Please tell us the lessons you learned that were not covered in the previous sections.

Topic	Lessons Learned
1. Project Close vs. Contract Close	The PPM Workflow does not effectively support the PMBOK's definition of contract close and project close to be synonymous. For this project, the contract had to be closed before the project is closed, and the contract cannot be closed unless the Acceptance Criteria checklist is signed-off. Contract close is not in Implementation Phase but in Project Close Phase, however both $$$ and hours are not requested in the Status tab. This caused confusion with ITS EPMO QA.
2. Project Managers as Contract Administrators	Per PMBOK, project manager should not be contract administrators, but in NC state government, both are the same person. NCDOJ ITD learned from this experience and acquired a dedicated contracts administrator in ITD to support all procurement activities, whether operational or project-related. This should help PMs maintain focus on their primary duties while the contract administrator monitors contract-related activities. It should be noted that NCDOJ has a Purchasing Officer as their overall contracts administrator, but this person's availability was very limited.
3. Capturing All Project Activities for Project Reporting	Per SB991, project activities are basically deemed only IT-related activities. However, in PMBOK, project activities are considered all activities related to the development and execution of the project, not just IT-related. This was not possible due to the lack of time reporting tool capability in NC state government, and a manual effort was extremely challenging due to dispersed geographical locations where the people-resources reside. Hopefully, BEACON will provide some means to efficiently capture this information for project reporting.

Exhibit J

DOT - SAP VIRSA Implementation

Planning & Design Phase:

Topic	Lessons Learned
1. Updated Budget	Doing a budget is not useful until the design is complete and you're exiting P&D
2. Project Approval Process	Very bureaucratic, very slow

Execution & Build Phase:

Topic	Lessons Learned
1. Project Approval Process	Very slow, very bureaucratic - too many signoffs, too many gate reviews – the Project Manager needs to make sure the time it takes to get through the Gate Approvals are incorporated into project schedule.
2. Change Management / Change Request	I was asked to process two CRs with the sole intention of changing the color of the UMT status bean. Very little business value was a derived.

Implementation Phase:

Topic	Lessons Learned
1. Project Approval Process	Three weeks had to be added to the schedule for the Gate 3 approvals. The Gate approval was not challenged, no concerns were raised; the process just took that long to complete. Something needs to be done to "Fast Track" uncontested approvals and streamline the process. There are too many signoffs required, by approvers who have no knowledge, or stake, in implementing the project. There's no sense of urgency.
2. Managing Sponsor Expectations	Sponsor was great – very supportive
3. Managing Customer Expectations	Customer stayed involved – very easy to work with
4. Issue Management	Way too many issues were raised that, in my opinion, had very little value in executing the project. In some cases, the issue was nothing more than commentary. I was left with the impression that the issue responses were not even being reviewed by the issue's author. Also, having the Project Manager close the issue is not productive; the issue should be closed by the issue's author, after they accept the response.
5. Monthly Status Reporting	The EPMO is too concerned with the color of the UMT status beans (R/G/Y), when they should be focusing on the issues driving the status. Too little effort is spent helping the PM mitigate the issue, while too much time is spent on posturing bean colors.
6. Project Schedule / Milestones / Project Planning	The PM must add time to the project schedule for Gate Approvals, which created some non productive time in the project schedule. If this is unacceptable, the EPMO / PMO should be sensitive to a certain amount of uncertainty while approval is being requested.
7. Resource Management	

(internal & external resources)	The Gate approval process drives downtime and delays into the project schedule – PM must plan for this. This is problematic when external resources are being utilized.
8. Project Cost vs Budget Cost	Too much emphasis is placed on hitting budget numbers. The budget is just an educated guess made at the beginning of the project. I was required by the EMPO to process two CRs to move dollars in between phases; no additional budget dollars were requested. This had very little business value.